



ACCOUNTING EXAMINING BOARD
Room 121C, 1400 East Washington Avenue, Madison
Contact: Brittany Lewin (608) 266-2112
May 12, 2016

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

A. Adoption of Agenda

B. Approval of Minutes of March 23, 2016

C. Administrative Matters

- 1) Staff Updates
- 2) Newsletter Update
- 3) CPAVerify and Accountancy Licensee Database Update

D. Legislative and Administrative Rule Matters – Discussion and Consideration

- 1) 2015 Wisconsin Act 217 Implementation
- 2) Continuing Education Legislative Report
- 3) Update on Pending and Possible Legislative and Rulemaking Projects

E. Examination Matters – Discussion and Consideration

- 1) Exam Eligibility Discussion and Frequently Asked Questions
- 2) New Version of Uniform CPA Examination Update

F. Credentialing Matters – Discussion and Consideration

- 1) Credentialing Process
- 2) Review of Delegation of Authority

G. National Association of State Boards of Accountancy Update

H. Speaking Engagement(s), Travel, or Public Relation Request(s)

I. Deliberation on Items Added After Preparation of Agenda:

- 1) Introductions, Announcements and Recognition
- 2) Election of Board Officers
- 3) Appointment of Board Liaison(s)
- 4) Administrative Updates or Administrative Matters
- 5) Education and Examination Matters

- 6) Credentialing Matters
- 7) Practice Matters
- 8) Legislative and Administrative Rule Matters
- 9) Liaison Reports
- 10) Informational Items
- 11) Disciplinary Matters
- 12) Presentations of Petitions for Summary Suspension
- 13) Petitions for Designation of Hearing Examiner
- 14) Presentation of Proposed Stipulations, Final Decisions and Orders
- 15) Presentation of Proposed Final Decision and Orders
- 16) Presentation of Interim Orders
- 17) Petitions for Re-Hearing
- 18) Petitions for Assessments
- 19) Petitions to Vacate Orders
- 20) Requests for Disciplinary Proceeding Presentations
- 21) Motions
- 22) Petitions
- 23) Appearances from Requests Received or Renewed
- 24) Speaking Engagement(s), Travel, or Public Relation Request(s)

J. Public Comments

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85 (1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85 (1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.).

K. Credentialing Matters

1) Application Reviews

- | | | |
|--|----------------------------|---------------------------|
| 1. Altobelli, Nicholas | 20. Grubich, Robert | 39. Oppeneer, John |
| 2. Biel, Steven | 21. Gulotta, Aaron | 40. Patrick, Jillian |
| 3. Bitran, Tamar | 22. Hanson, Anthony | 41. Pearce, Joshua |
| 4. Blodgett, Chelsey | 23. Heberer, Stephen | 42. Peaschek, Mary |
| 5. Bolen-Irwin, Katie | 24. Heinen, Beth | 43. Perkins, Casey |
| 6. Bote, Ronald (also
conv, endo edu) | 25. Ihlenfeldt, Amanda | 44. Pezanoski, Mitchell |
| 7. Bouruc, Alina | 26. Keller, Kacey | 45. Punzenberger, Todd |
| 8. Bowman, Jonathan | 27. Kinnunen, David | 46. Puyleart, Travis |
| 9. Branaugh, Adam | 28. Klug, Joshua | 47. Reitz, Terry |
| 10. Carter, Jacob | 29. Kurutz, Eric | 48. Ruth, Christine |
| 11. Davis, Ryan | 30. Lund, Dan | 49. Schommer, Philip |
| 12. Degnan, Alexander | 31. Macinnes, Laura | 50. Semrad, Timothy |
| 13. Dorner, Brianna | 32. Mazoch, Eric | 51. Shah, Ronak |
| 14. Edlund, Gregory | 33. McElroy, Robert | 52. Short, David |
| 15. Endres, Stephanie | 34. Melnyk, Lesya | 53. Staerkel, Joshua |
| 16. Feller, Cassie | 35. Moroder, Justin | 54. Steffensmeier, Joseph |
| 17. Fiess, Stephanie | 36. Mueller, Chad | 55. Strautmann, Susan |
| 18. Giese, Cody | 37. Munshi,
Mohmedrafiq | 56. Sutkiewicz, Kara |
| 19. Govani, Alia | 38. Olejniczak, Timothy | 57. Thomas, Jonathan |
| | | 58. Tilque, Travis |

59. Vaughn, Chase
60. Wang, Yun
61. Watkins, Christopher

62. Westfall, James
63. Weber, Tabitha
64. Xu, Ting

65. Yenter, Marilyn
66. Yorton, Abigail
67. Zhu, Mei

2) Endorsement Applicants Under Wis. Stat. 442.05

1. Board, Karsten
2. Boone, Henri
3. Bote, Ronald
4. Brock, Jenny
5. Brylla, Daniel
6. Buoy, Keenan
7. Dorschner, Donna
8. Haas, Matthew

9. Hirsch, Linda
10. Huey, Allison
11. Lyons, Emily
12. Nygaard, Kyle
13. Podraza, Benjamin
14. Puckylowski, Shawn
15. Stone, Kyle
16. Thomson, Ramona

3) Applications for Approval of Licensure

1. Albrecht, Ryan
2. Anderson, Rachel
3. Barman, Drew
4. Barnett, Ashley
5. Batzko, Tyler
6. Beres, Jacob
7. Bishop, Jalissa
8. Bonow, Jeremy
9. Braker, Jonathan
10. Bruce, Charles
11. Bruskiwicz, Sean
12. Casper, Richard
13. Cornillie, Clare
14. Crafton, Kenesha
15. Drew, Patrick
16. Dull, Codie
17. Ehlers, Jeffrey
18. Emerson, Timothy
19. Encarnacion, Otoniel
20. Evanoff, Matthew
21. Farnam, Joshua
22. Feller, Mitchell

23. Fertitta, Ryne
24. Fignar, Mark
25. Harman, Korina
26. Harris, Matthew
27. Harvey, Matthew
28. Helein, Ross
29. Helminiak, Joel
30. Hess, Dustin
31. Hoppman, Brandon
32. Jansen, Mandy
33. Kalepp-Morines,
Klare
34. Kniess, Kelsey
35. Kursel, Ryan
36. Lamberty, Chelsea
37. Lembcke, Adam
38. Lewis, Adam
39. Meinel, Kristine
40. Mousel, Tashanna
41. Muehlbauer, Kylie
42. Nelsen, Rebecca
43. Newhouse, Nicholas

44. Penrod, Nicholas
45. Pockat, Kyle
46. Porcaro, Matthew
47. Risse, Charles
48. Runde, Jillian
49. Ruth, Brittany
50. Satina, Greg
51. Scherber, Sarah
52. Schmidt, Sam
53. Seiple, Elaine
54. Severing, Charlotte
55. Schroeder, Matthew
56. Sinz, Matthew
57. Smits, Brandon
58. St. Peter, Matthew
59. Stoltenberg, Aaron
60. Udovich, Eric
61. Vincent, Ryan
62. Wambura, Fidel
63. Yaeger, Joel

4) Firm Applications and Licensure

5) Re-Registration Candidates

L. Deliberation on Division of Legal Services and Compliance (DLSC) Matters

1) Proposed Stipulation and Final Decision and Order

1. 15 ACC 014 – Keith E. Rode

M. Proposed Final Decision and Order

1) In the Matter of the Disciplinary Proceedings Against Jay L. Lindseth, Respondent, DHA
Case No. SPS-15-0089 DLSC Case No. 14 ACC 018

N. Deliberation of Items Added After Preparation of the Agenda

- 1) Education and Examination Matters
- 2) Credentialing Matters
- 3) Disciplinary Matters
- 4) Monitoring Matters
- 5) Professional Assistance Procedure (PAP) Matters
- 6) Petitions for Summary Suspensions
- 7) Petitions for Designation of Hearing Examiner
- 8) Proposed Stipulations, Final Decisions and Order
- 9) Administrative Warnings
- 10) Review of Administrative Warnings
- 11) Proposed Final Decision and Orders
- 12) Matters Relating to Costs/ Orders Fixing Costs
- 13) Case Closings
- 14) Proposed Interim Orders
- 15) Petitions for Assessments and Evaluations
- 16) Petitions to Vacate Orders
- 17) Report from Department Auditor
- 18) Remedial Education Cases
- 19) Motions
- 20) Petitions for Re-Hearing
- 21) Appearances from Requests Received or Renewed

O. Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

P. Vote on Items Considered or Deliberated Upon in Closed Session, if Voting is Appropriate

Q. Open Session Items Noticed Above not Completed in the Initial Open Session

ADJOURNMENT

NEXT MEETING DATE AUGUST 9, 2016

MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held at 1400 East Washington Avenue, Madison, Wisconsin, unless otherwise noted. In order to confirm a meeting or to request a complete copy of the board's agenda, please call the listed contact person. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of disciplinary hearings may be changed by the examiner for the convenience of the parties. Interpreters for the hearing impaired provided upon request by contacting the Affirmative Action Officer, 608-266-2112.